



## Analysis, Campaign and Database Marketing Data Services

[www.B2BdatabaseTeam.com](http://www.B2BdatabaseTeam.com) and [www.TrinityTelco.com](http://www.TrinityTelco.com)

Our Trinity B2B Database Team and Mobile APP can assist in numerous data analysis functions.



Please review the brief descriptions of the most common areas;

### **1. B2B and B2C geographic analysis**

Transactional information from accounting & billing system(s) can be formatted into sales management friendly geographic analysis in any level of detail. This can include standard regional, provincial, municipal and postal code breakouts. Rural versus urban as well as penetration analysis of residential and businesses in prescribed territories can be produced on a monthly, quarterly and annual basis. Company relevant data can be illustrated in graphs and pie charts produced on demand by excel macros. This valuable perspective is essential to properly staff territories and to monitor the productivity of the company's individual sales representatives, agents or distribution channels. Month to month and year to date comparisons of your data can yield early warning to management of potential negative variances in territory performance.

### **2. De-duplication of B2C /consumer lists**

The sheer volume of residential and consumer prospect and customer lists make them very expensive to communicate to. It is essential to have an accurate and reliable means to ensure your company's collateral materials and brochures and other printed documents reach the intended customer or prospect without waste of over production of printed documents. Our de-duplication methods determine unique households. Using the company's customer or prospect files as a base, we assign unique identifiers to each record and merge and purge out duplicate records. Where multiple records occur for a specific individual household, the merging of the best customer or prospect data survives to improve the mailing addressing quality. In addition VIP customers or VIP prospects' mailing materials can be cosmetically "key coded". This ensures when an order is faxed or a business postage reply is returned your company's order desk personnel recognize the importance of the new order and can identify exactly when your offer was originally sent to the prospective customer. In addition a standardization of salutations (Mr. Mrs. Ms. Etc.) can greatly enhance the data entry quality of the customer's personal information. This will avoid repetitive embarrassing & frustrating typos on customer's names and addresses. Key customers and key prospects can be key coded or flagged for the company so that valuable and profitable customers and prospects receive the most appropriate quantity of communications and mailings from your company.

### **3. De-duplication of B2B / business lists**

Business lists and traditional B2B (business to business) communication present specific issues and problems for companies to de-duplicate their multiple lists. Transitions in agents, sales representatives, overlapping geographic territories and the natural deterioration of in-house company files make the review and rationalization of business lists very important. Even though a business customer may not physically move to a new business location, changes in the customers' or prospects' staff necessitate the need that the key decision makers are receiving the client's collateral materials and mailings. Nothing confuses a customer more than multiple and conflicting sales messages from two or more agents representing the same service. Similar to some elements in consumer list hygiene, business lists contain individual decision maker's surname and first name and salutation as well as additional information such as title, department, floor and divisional identifiers. Our methods truncate and cleanse and harmonize the company's business lists. In addition your customer's Root Company Name or Unique Enterprise method as described below could be very beneficial.

#### 4. Unique Enterprise CCV

Perhaps the most frustrating but financially rewarding for companies is the data mining and identifying of unique enterprises.

Common Customer View (CCV) uses de-duplication methods to filter different variances in corporate or brand names to identify unique single enterprises in your company's files. Some customers cannot be identified with simple alphabetical or postal code sorting and it takes systematic company name hygiene and filtering methods to link common customer locations or accounts together. In particular where different divisions or different sales territories have records for the same company, these overlaps can be identified and a unique corporate enterprise identifier can be appended to the customer's record. This enhances the company's communication and analysis of a customer since all revenues to a common enterprise can be clearly recognized. Not only improving sales force accountability, coverage and compensation analysis, the overall relationship with a customer unique site can be highlighted.



[www.youtube.com/watch?v=95t\\_LxsMPdM](http://www.youtube.com/watch?v=95t_LxsMPdM)

#### 5. Identify the Industry or Business Activity

Often companies request an understanding of the value of a particular business customer. They need to know if the full potential of a customer is being reached by their annual sales to a company. This is dependent upon numerous factors but the universal starting point of this typical request is what industry or business function is the customer involved in? Some industries offer only marginal revenue potential, while other industries are not as delivery time or price sensitive as other industries. Certain industry types could buy more of your services and products if only there was an effective method to classify what types of industries should be the best buyers. Companies want to know their customer's industry without depending upon the interpretation or lack of field sales feedback. Our methods can determine the nature of your business customers with a high level of accuracy based solely on the customer's company name. This is accomplished without the expensive and time consuming rental of national databases of either Dun & Brad or Info-Canada Info-USA or other national industry specific directories. Our method prioritizes the different types of businesses conducting transactions with your company and highlights the major SIC (Standard Industrial Classifications).

Once this base level analysis is conducted through our analysis we can assign weighted scores to your customer base to determine if they are meeting reasonable sales expectations. It will be surprising to illustrate that some new types of businesses are a growing part of your future sales while other industries may be falling off. The above process is a logical SIC classification combined with applying a score based on known attributes of an industry type. This will provide insight into whether your sales efforts are successful, modest or under full potential with a specific customer. Combining this technique with an early warning churn analysis as described below would be very beneficial.



[www.youtube.com/watch?v=EdGo-yv\\_TYU](http://www.youtube.com/watch?v=EdGo-yv_TYU)



## 6. Churn Early Warning Prediction

The old philosopher statement “You never know what you have until it is lost” bears insight into this service. Dissatisfied business customers usually leave in stages. They may provide numerous clues, which can be used to predict if they are considering a change to another supplier. Our methods help companies identify the potential of this churn in an early warning method. Of course seasonal fluctuations make the identification of potentially defecting customers to your competition more difficult to determine. Using monthly transactional data from your company we identify 5 or more types of customers in an early warning or early opportunity stage. We can segment your customers into 5 or more distinct groups to illustrate to your sales force how to recognize the following major classifications...

- i) Rising Stars, rapidly increasing sales new customer
- ii) Moderate Growth customer
- iii) Old Reliable with stable sales customer
- iv) Early Warning declining sales customer
- v) Rapid declining in sales customer

Often your field sales force cannot recognize the health of your existing customer base since they are spending their time on developing new business. This can be dangerous since key accounts starting to anticipate churning to the competition can often be salvaged if only they receive the attention and servicing at the critical decision making time. Our methods can identify the important accounts at risk as well as the new accounts that deserve special sales force attention. Month over month or year over year comparisons can determine if the customer churn is highly probable or that the decline is only a seasonal fluctuation to be expected. This service is particularly useful in accurate forecasting and quota setting processes. Productivity of individual sales representatives can be illustrated to ensure the territory has an acceptable ratio of rising stars, and old reliable customers and to provide your sales management with an early warning of potential losses of key accounts and revenues. These basic analysis techniques can be enhanced to fully sophisticated RFM analysis in which the companies' customer base is analyzed monthly to determine the composition of the customer base in recen-cy (R) or age of last order, frequency (F) of purchases, and monetary (M) value of the purchases.

## 7. Merge/Purge of Rental with In-House lists

Occasionally various files and customer and prospect lists need to analyzed prior to an expensive direct mail campaign. Various lists compiled by previous and current sales representatives, different divisions and different sources need to be merged and purged to yield the consolidated view of the actual mailing & print quantity. We can analyze and assist companies on the net /net quantity which will survive or be outputted from a merge purge. This is highly useful in determining budgets and sales forecasts for acquisition, re-activation and retention campaigns.



## 8. SOHO vs. Commercial Identifier

Often a distinction in qualifying prospective customers is required. You would want to think your sales force can handle all and any incoming requests yet we all know that it is difficult to determine the best “requestor” to pursue first. Often valuable sales force time and energy is wasted providing “quotations” to small and not seriously interested companies. Our method can assist in determining if the request is coming from a company at a probable commercial address versus a residential/ consumer or SOHO requestor. Lead generation often generates requests for more information but often the inquirer does not provide full details about his company name, address or even the nature of his business and his inquiry. Using a combination of analytical methods we can assist your company in prioritizing requests with the highest probability of serious commercial requestors as well as comparing other Canada Post data to determine if your company has penetration with this potential customer.



[www.youtube.com/watch?v=Qim43AOVP2k](http://www.youtube.com/watch?v=Qim43AOVP2k)

## 9. Ethnic Background Identifier

The ethnic diversity of the Canadian and American marketplace has always presented a specific communication problem as well as a great opportunity for businesses wishing to beat the competition to affluent ethnic consumer and business customers. Our methods segment prospect or customers using much more than contact surnames into highly predictive ethnic origin segments. The Asian and Chinese segment has been one example in which companies have tailored their prospecting and advertising to niche affluent ethnic markets. In addition, companies may find it highly successful to match their order desk personnel language skills to incoming callers or specific 1-800 lines offers. Having an affinity with a potential customer, perhaps taking the order in their preferred language will make lasting business relationships. This personalized segmentation of a prospect and customer base can make your company’s creative brochure and sales efforts much more receptive by the customer.



[www.youtube.com/watch?v=3S7OS6fm4XE](http://www.youtube.com/watch?v=3S7OS6fm4XE)

## 10. Loyalty Program & RFM

Loyalty and awards campaigns and programs have become a standard in today’s highly competitive market place. Business and consumer customers expect & demand compensation/rewards for their continued loyalty and repeat business and have become tainted with points and miles and reward fever. But what if your company is NOT a current sponsor in a slick national loyalty program and is locked OUT by the category exclusivity clause of a competitor who has the contract with the Airmiles, Aeroplan and other retail, petrol or hospitality award programs? Our methods in analysis separate the hype from the reality and I can provide your company the true RFM (Recency, Frequency and Monetary values of your customer base). This can counter-act the impact of a competitor’s national loyalty program by identifying YOUR Company’s most loyal customers so you can protect and develop those customers more. It will identify the moderate and high potential customers also.

By analyzing your transactional information even if your company has never maintained a customer mailing list in its entire history, we can assist you to build a customized logical retention program. You will begin to provide incremental service to VIP customers you previously did not recognize and you wouldn’t be drawn into wide spread discounts and incentives for every customer or order.

If you are anticipating being a sponsor in a national program we can offer your company assistance in an objective analysis if it is right for you. We can provide insight if your national loyalty program is giving you the bang it promised and make sure your company is getting value for its investment, commitment and tie in to a national coalition marketing organization and program.



## **11. Info-Canada Info-USA & Dun & Bradstreet Experience**

Our experience can recommend and consult on the most appropriate use of the national business and consumer databases available for rental. By analyzing your company's acquisition objectives we can recommend niche segments within the national databases. In addition by enhancing these national databases with my analysis it can add important insight into a raw prospect list your company may wish to pursue. Having extensive experience with both the national databases we can anticipate the Pros & Cons of each list and recommend the best rental plan for your company.

## **12. Telephone Call Detail RFM**

Using caller information from your company's PBX and telephone system or from reports from your telecom supplier we can conduct analysis of your company's telephone traffic. This is largely important to determine the RFM of callers but also to identify potential areas of cost savings and potential sales. Often potential customers place inquiry calls into your company but do not return to complete the order. Our methods identify prospects that expressed an interest in your products and will give your sales force a second chance to secure an order. By using our analytical methods we can flag potential danger signs in callers such as repeat callers for customer service or backorders. These can illustrate early warning signs for your internal processes and reduce potential churning of dissatisfied callers. We are familiar with call centre and order desk requirements and can interact with your telecom provider to enhance your information gathering capability. Knowing who called and in what frequency and time frame will make your company better to capitalize on previously lost orders from prospects that disappeared.

## **13. Internal Transactional Analysis**

Less glamorous but ever just as important is the internal analysis of your company's transactions. Occasionally a company's purchasing and manufacturing department is not in sync with the accounting or sales or marketing departments.

Are your sales profitable? What is the LTV lifetime value of a customer? How much should your company spend on acquiring a new customer? We have found if only different departments recognized and could link the measurements that are important to their department with the important measurements of peers & cross functional departments their organization could become much more profitable and reactive to the marketplace.

We have found at some companies, the sales and marketing teams feel they are held "hostage" to unresponsive IT/IS systems and expensive programming "fixes". Our methods understand the classic measurements and how to link the communication between departments for management review. We will help your company's cross functional teams recognize if Product/Item A (which is low margin product) if sold in the same order with at least 2 pieces of Product/Item B (a high margin product) your company will excel in profitability. We can assist that understanding and communicate those important linkages between different departments so the entire team can succeed in its corporate objectives.

## **14. Direct and Database Marketing Experience**

All too often the most important element of success which is your own customer transactional information is delegated to junior entry level analytical staff that may have the basic computer skills like MS Excel but lack the experience or knowledge of direct marketing classical tools. We can review your current reports and advise how with some data manipulation more business insight into customers, territories or prospects can be derived. These methods detailed above will make your company more self-sufficient in data analysis





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